1. INTRODUCTION

1.1 PURPOSE OF STUDY

This report examines the volume, value and resultant economic impact of tourism on the County of Hampshire. Results are presented at District and County level. The study was undertaken by Tourism South East on behalf of Hampshire County Council using a widely recognised, industry specific methodology, known as the Cambridge Model. To date, this approach has been widely applied across England and the South East region to produce an indicative outline of the scale of tourism activity on a local area basis.

1.2 THE CAMBRIDGE MODEL

The Cambridge Model is essentially a computer-based spreadsheet model that produces estimates from existing national and local information (e.g. accommodation stocks, inbound trips) of the level of tourism activity within a given local area. The volume of visits is translated into economic terms by estimating the amounts of spending by visitors based on their average spend per trip. In turn, the impact of that spending can be translated to estimate the effects in terms of business turnover and jobs.

The standard measures generated in this Model are: the total amount spent by visitors, the amount of income for local residents and businesses created by this spending, and the number of jobs supported by visitor spending. This report focuses on total revenue raised from visitor spending across Hampshire and the estimated number of full-time equivalent and actual jobs sustained by that spending.

As the Model utilises a standard methodology capable of application throughout the UK, it offers the potential for direct comparisons with similar destinations throughout the country.

The basic process of estimation used can be divided into three parts:

- Visitor trips and visitor spending at a regional/county level derived from national survey sources (county/district) ;
- Local supply data on accommodation, attractions and other factors specific to Hampshire;
- The use of multipliers derived from business surveys in England to estimate full time equivalent and actual jobs generated by visitor spending in the area.

The sophistication of the economic impact estimates will depend on the availability of detailed reliable local information to supplement national and regional data sources. Where such data is available from local surveys, then local variations can be explicitly included. In its standard form, the Cambridge Model uses a range of local data including details of accommodation stock, local occupancy rates, population, employment, local wage rates and visits to attractions. It applies this locally sourced information to regional estimates of tourism volume and expenditure derived from the following national surveys:

- United Kingdom Tourism Survey 2008
- International Passenger Survey 2008
- England Leisure Day Visits Survey 2005
- Census of Population 2001
- Labour Force Survey 2008
- Visits to Attractions Survey 2008
- New Earnings Survey 2008
- Census of Employment 2008

The following local data sources were gathered:

1.2.1 Review of accommodation stock in each district

A comprehensive review was carried out of visitor accommodation capacity in the County. This included all assessed and non-assessed commercial accommodation (serviced and non-serviced), visitor berths, second homes and language schools. The review involved desk research drawing data from databases held by VisitBritain, searches through Yellow Pages, Thompsons Directory and the Internet, and referencing this with local authority VAT registration lists, the ONS website for second homes and RYA for data on visitor berths. Results are presented in Table (i).

Table i: visitor accommodation capacity in Hampshire

Accommodation supply	Basingstoke	East Hants	Eastleigh	Fareham	Gosport	Hart	Havant	New Forest	Portsmouth	Rushmoor	Southampton	Test Valley	Winchester	County
Hotels/Guest Houses (bedspaces)	2061	1199	1634	1112	212	2110	1651	3515	5215	1812	6176	1513	2474	**30684**
B&B (bedspaces)	163	360	140	69	34	80	148	1274	73	62	146	427	522	**3498**
Self catering (units)	0	36	5	14	29	3	87	366	114	0	107	62	76	**899**
Caravan & tents (pitches)	0	96	372	506	152	0	1,257	7,769	211	0	15	205	236	**10819**
Holiday centres (units)	0	0	0	0	0	0	661	120	60	0	0	0	0	**841**
Youth hostels (bedspaces)	350	0	48	0	0	0	0	27	60	0	240	0	176	**901**
Campus (bedspaces)	0	0	0	0	0	0	0	0	1872	0	1088	0	2106	**5066**
Second homes (per home)	194	203	113	137	196	120	576	1172	340	49	227	207	200	**3734**
Marinas (berths)	0	0	0	1617	1119	0	740	1195	325	0	1065	0	0	6061
Language schools	0	4	0	3	0	0	1	0	2	0	8	0	4	22

Source: TSE Accommodation Audit 2007-2008

1.2.2 Size of resident population

Data on the size of the local population is required to estimate the number of trips involving staying in the homes of friends and relatives. Resident population data is based on the Registrar General's mid year estimates. These are as follows:

Table ii: Resident population estimates

Resident	Population	Resident	Population
Basingstoke	161,700	New Forest	175,400
East Hants	111,700	Portsmouth	200,000
Eastleigh	121,000	Rushmoor	89,600
Fareham	110,300	Southampton	234,600
Gosport	80,000	Test Valley	115,400
Hart	90,600	Winchester	112,700
Havant	117,600	County	1,720,600

Office of National Statistics

1.2.3 Employment and average wage costs

Local data is obtained from the Labour Force Survey and the Annual Survey of Hours and Earnings to identify the level of visitor expenditure required to support a full-timed equivalent job in tourism businesses and the proportion of tourism related employment among the labour force.

Table iii: Wage costs and total employment

	Accomm.	Retail	Catering	Attractions	Transport	Total employee jobs
Basingstoke	£22,353	£25,159	£21,436	£34,223	£27,279	80,700
East Hants	£16,826	£18,938	£16,135	£25,760	£20,533	43,700
Eastleigh	£17,762	£19,992	£17,033	£27,194	£21,676	60,800
Fareham	£17,588	£19,796	£16,866	£26,927	£21,463	47,700
Gosport	£15,739	£17,714	£15,093	£24,096	£19,206	20,300
Hart	£23,828	£26,819	£22,850	£36,480	£29,078	38,200
Havant	£16,601	£18,685	£15,920	£25,416	£20,259	38,700
New Forest	£17,923	£20,173	£17,187	£27,440	£21,872	65,800
Portsmouth	£18,370	£20,676	£17,616	£28,125	£22,418	97,500
Rushmoor	£26,024	£29,290	£24,956	£39,843	£31,758	43,600
Southampton	£19,527	£21,979	£18,726	£29,897	£23,830	113,800
Test Valley	£16,198	£18,231	£15,533	£24,799	£19,767	50,500
Winchester	£22,083	£24,855	£21,176	£33,809	£26,948	67,200
County	£19,294	£21,716	£18,502	£29,539	£23,545	552,900

Office of National Statistics

1.2.4 Collection of average bed occupancy data for 2008

Data is drawn from the 2008 Hampshire Tourism Trends Study to estimate the volume of staying visitors. Data overseas occupancy and business trip occupancy is also extracted from the study.

Table ix: Avg. County Room Occupancy

	2006	2008	% change
Hampshire	64	63	-1%
UKOS South East Region	61	59	-3%

1.2.5 Collection of number of visits to attractions figures

Data is drawn from the 2008 Hampshire Tourism Trends Study to corroborate estimates produced for tourism day trips. Results for 2008 are:

Table x: Visits to attractions

	2006	2008	% Change
Hampshire	3,261,822	3,503,785	7%
East Hampshire	393,854	408,854	4%
Havant	114,551	125,477	10%
New Forest	501,574	484,352	-3%
North Hampshire	129,394	140,724	9%
Portsmouth	558,436	616,943	10%
Southampton	124,190	100,233	-19%
Test Valley	324,556	327,018	1%
Winchester	593,232	699,147	18%

1.3 OBJECTIVES OF ECONOMIC MODELLING

In applying the Cambridge Model, the main objectives are to provide information on the economic impact of visitors and raise awareness of the profile and local importance of tourism in Hampshire.

The Model will be used to:

- Derive estimates of the volume of domestic and overseas overnight visitors visiting the Hampshire during the year, by type of accommodation and purpose of visit;
- Derive estimates of the volume of day visitors visiting Hampshire during the year, by purpose of visit;
- Derive estimates of the value of tourism spending accruing to Hampshire, and the impact of this spending on different sectors of the local economy, in terms of jobs supported.

1.4 CAMBRIDGE MODEL VERSION II

Since the inception of the original Cambridge Model approach, a number of changes have occurred to the model's methodology and the context of operation. Most importantly, autumn 2002 saw the launch of Cambridge Model Version II. This revised approach was developed from work undertaken for the South West Regional Development Agency and includes a number of enhancements. These include:

- Greater use of local data within the standardised model e.g. occupancy data, information on local wage rates
- Enhanced outputs, notably visitor nights by accommodation type, spend by accommodation type, impact of *'additional trip related expenditure'*. The latter refers to expenditure associated with ongoing expenditure on accommodation in the case of visitors overnight at second homes or private boats, or additional spending by non visitors e.g. friends and relatives with whom the visitor is overnight.

2. SUMMARY RESULTS

2.1 National and Regional headlines

- The most significant development affecting the industry in 2008 was the onset of global economic downturn. Turmoil in the financial sector across the USA and Europe ushered in a period of austerity in the UK following almost 16 years of unbroken gross domestic product (GDP) growth. The contraction of GDP in quarters 3 and 4 of 2008 was the first time the UK economy recorded negative growth in consecutive periods since 1991.

- Domestic holidays and leisure travel in general suffered. In England, domestic tourism contracted by 4.7% in trip volume (from just over 100 million trips in 2007 to 95.5 million trips in 2008) and by 0.6% in trip expenditure compared to the previous year (from £16.5 billion in 2007 to £16.4 billion in 2008). VFR experienced the steepest decline (-8%) compared to 2007, whilst holiday trips fell by 4%.

- The impact on travel has, however, been global. Results from the International Passenger Survey (IPS) reveal a reduction in the volume of inbound tourism visits into England in 2008 (-1.6% compared with 2007). Inbound tourism visits into England fell from 27.8 million in 2007 to 27.3 million in 2008.

- Results for Q4 for the year show that business visits were hardest hit; down by 25% compared to the same period last year, as companies tightened up on travel expenditure (VFR visits and Holiday visits were more resilient, down 7% and 5% respectively despite the weak sterling). Trips from the USA dropped the most as Americans' lowest ever levels of consumer confidence and rising unemployment meant that far fewer took holidays abroad in 2008.

- However, despite the drop in inbound trips, the overall level of visitor expenditure from international visitors increased in 2008 compared to 2007 by 3.8%. The weakness of the pound against other currencies explains part of the reason for the increase in expenditure. It is also likely that many international visitors took advantage of the weak pound and spent more money on higher value items increasing average expenditure per head.

- Figures from the United Kingdom Tourism Survey (UKTS) suggest that Britons took just over 16.3 million overnight trips to the South East in 2008 and spent approximately £2.4 billion. The South East continued to be a popular destination for overnight domestic trips, only marginally second to the South West which attracts the largest proportion of domestic trips across England. Approximately 14% of England's total domestic trip expenditure was spent in the South East in 2008.

- Short breaks continued to be the mainstay of the domestic tourism market in the region. Three quarters of trips involved a duration of 1 – 3 nights with only 19% of trips involving 4 or more nights.

- Since 2006 domestic tourism has been in decline at the national and regional level. According to UKTS the volume of domestic trips spent in the South East dropped by 0.4% in 2006 compared to the previous year. It dropped again in 2007 by 1.6% and by 8.8% in 2008, greater than the national drop of 4.7%.

- With fewer overall trips, the number of nights spent by domestic visitors in the South East dropped from around 50 million in 2007 to 45.5 million in 2008 a reduction of 4.9%. Once again a downward trend is evident over the past few years.

- Domestic trip expenditure in the region has also continued to drop since 2006 but at a far lesser rate than the overall drop in trips. In 2008 domestic visitors spent approximately £2.4 billion, a similar level to 2007. The increase in the price of many goods and services in 2008 is likely to have halted a drop in average visitor expenditure.

- In addition to domestic overnight trips, the South East is a popular destination among UK households for same-day leisure trips. Domestic tourism day trips outnumber domestic overnight trips by a factor of 11 to 1. It is estimated that there were approximately 190 million tourism day trips from home in the region in 2008. The total value of expenditure on tourism day trips was approximately £6.3 billion[1].

[1] *The tourism day trip figures are estimates based on the 2005 England Leisure Visits Survey. Since 2005 the survey has not been repeated. Currently the ONS is reviewing the possibility of adding questions on day trips to its various domestic omnibus surveys to calculate the volume and value of tourism day trips.*

2.2 HEADLINE COUNTY RESULTS

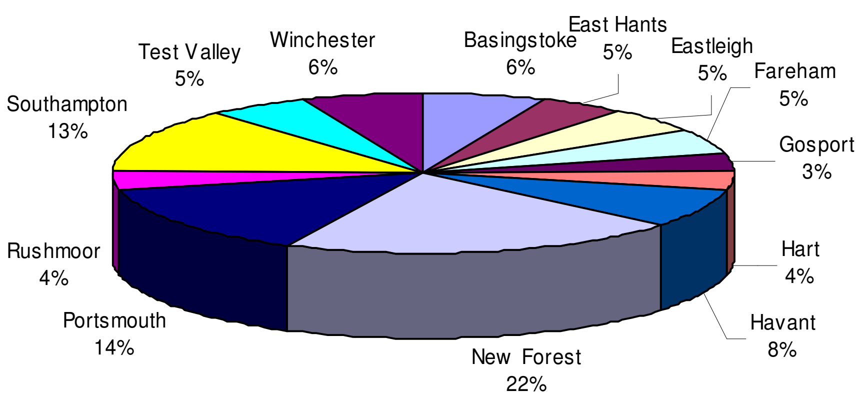
- 4,305,000 overnight trips (domestic and inbound), down 5.6%
- £753,142,000 spent by all overnight visitors on their trip, down 1.5%
- 37,016,000 tourism day trips, up 3.2%
- £1,554,047,000 spent by tourism day visitors on their trip, up 3.4%
- £2,278,562,000 spent by all visitors on their trip, up 1.7%
- £104,987,000 additional expenditure by friends and relatives on visitors and visitors spend on second homes and boats.
- £2,685,973,000 income for local businesses generated by total tourism activity, up 0.6%
- 56,246 employee jobs supported across Hampshire by tourism expenditure

2.3 TOTAL DOMESTIC OVERNIGHT TRIPS

2.3.1 It is estimated that approximately 3.7 million overnight trips were made to Hampshire in 2008 by visitors from other parts of the UK, a drop of 6.7% compared to 2006. **See table 1**

2.3.2 A fifth of all domestic trips to the county involved trips to the New Forest. The two unitaries, Portsmouth and Southampton also made significant contributions to the total volume of domestic trips (14% and 13% respectively).

Figure i: Distribution of domestic overnight trips



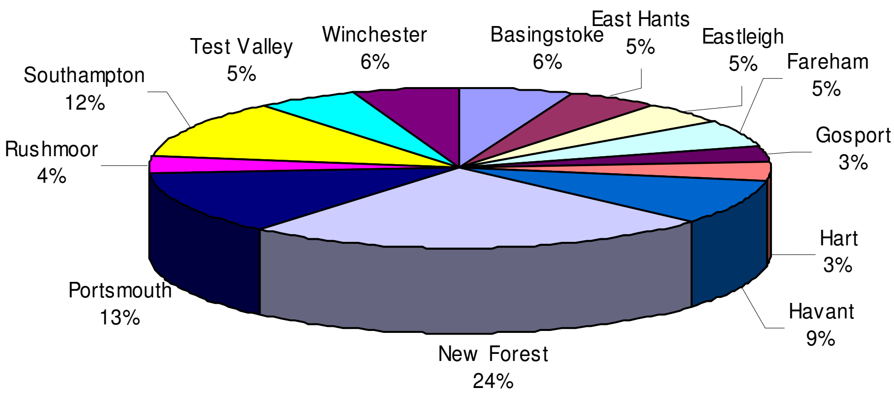
2.3.3 Nearly half of domestic overnight trips to Hampshire involved staying in the homes of friends or relatives (48.3%). Thirty percent of trips involved staying in serviced accommodation (i.e. hotel, guest house or B&B). **See table 1**

2.3.4 Around 16% of all domestic overnight trips involved staying in non-serviced accommodation (i.e. self-catering, camping, and static & touring caravan sites). Two percent of trips domestic overnight trips involved staying on boats and 2.5% involved staying in more than one type of accommodation over the duration of the trip. **See table 1**

2.3.5 Domestic trips involved a total of 11.3 million bednights, providing an average trip length of length of 3.0 nights, a slight increase in trip length compared to 2006 (2.7 nights) due to more trips involving staying in the homes of friends/relatives in 2008 which tend to have a longer trip length than trips involving serviced accommodation. **See table 4 & table 7**

2.3.6 Reflecting the overall volume of domestic trips to these destinations, the New Forest, Portsmouth and Southampton accounted for 49% of all domestic nights in the county.

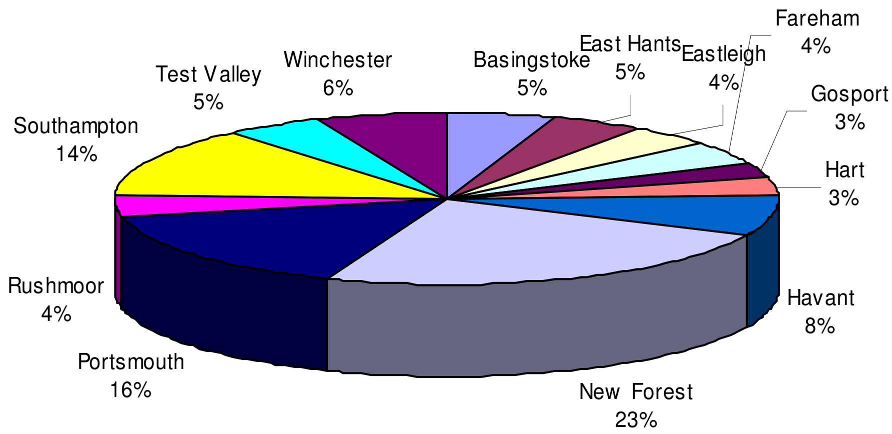
Figure ii: Distribution of domestic trip nights



2.3.7 It is estimated that the expenditure associated with domestic overnight trips was somewhere in the region of £566.2 million (a drop of 1.7% compared to 2006), providing an average spend of £48.68 (from £52.73 in 2006) per person per night and £140.90 (from £143.63 in 2006) per person per trip. **See table 8 & 11**

2.3.8 The model calculates that around 23% of domestic trip expenditure in Hampshire is made in the New Forest. The destination accounting for the second largest contribution of domestic spend is Portsmouth (16%) followed by Southampton (14%).

Figure iii: Distribution of domestic overnight trip spend



2.3.9 Around 40% (8% less than in 2006) of domestic overnight trip expenditure was made by those staying in serviced accommodation (which partly accounts for the drop in average expenditure per head) . Nearly a third (29.4%) of domestic trip expenditure was made by those staying in the home of friends and relatives. **See table 8**

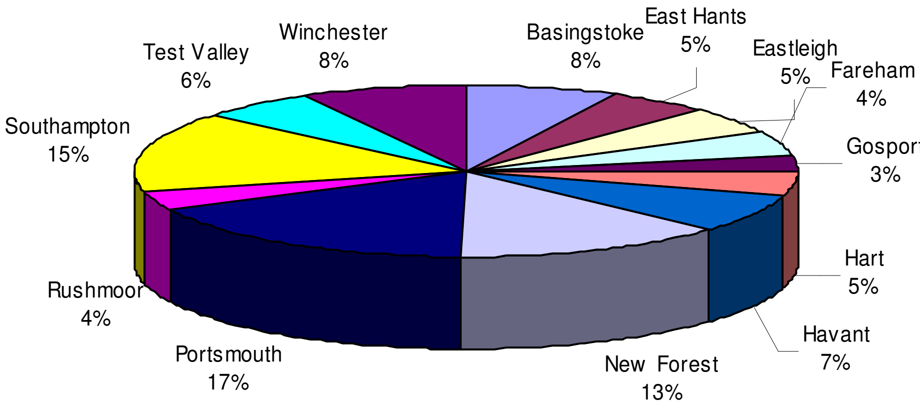
2.3.10 Visitors staying in non-serviced accommodation accounted for 25.4% of total domestic trip expenditure. Visitors staying on boats accounted for 1% of total domestic trip expenditure. Two percent of domestic trip expenditure came from visitors staying in more than one type of accommodation over the duration of the trip and 1% involved second homes. **See table 8**

2.4 TOTAL OVERSEAS OVERNIGHT TRIPS

2.4.1 It is estimated that around half a million (519,000) overnight trips were made to Hampshire in 2008 by visitors from outside the UK, a drop of 3.7% compared to 2006. **See table 2**

2.4.2 In Hampshire, Portsmouth (17%), Southampton (15%), North Hampshire (15%), and the New Forest (13%) are the three main destinations attracting the largest volume of overseas trips.

Figure iv: Distribution of inbound overnight trips



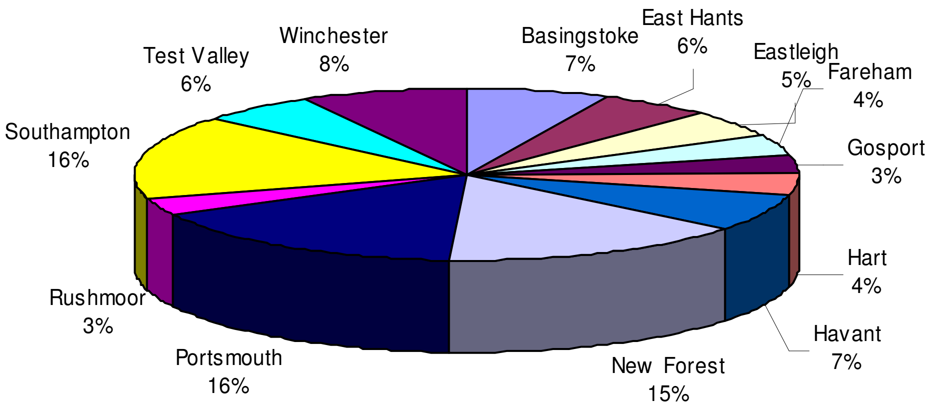
2.4.3 Thirty-seven percent of overseas overnight trips to Hampshire involved staying in serviced accommodation. Forty-four percent involved staying in the home of friends or relatives. Eight percent of all overseas overnight trips involved staying in non-serviced accommodation. **See table 2**

2.4.4 Reflecting the presence of a small minority of language students, around 3% of overseas trips involved staying in lodgings as paying guests. A further 3.1% involved staying in hostel or university/college campus accommodation. Around 1% of trips involved staying in a second home. The remaining 4.6% involved staying in more than one type of accommodation over the duration of the trip. **See table 2**

2.4.5 Overseas trips involved a total of 3.8 million bednights, providing an average trip length of 7.08 (down from avg. of 7.7 nights in 2006). **See table 5 & table 7**

2.4.6 Reflecting the volume of overseas trips, Portsmouth (16%), Southampton (16%), and the New Forest (15%) are the three main destinations attracting the largest volume of overseas nights across Hampshire.

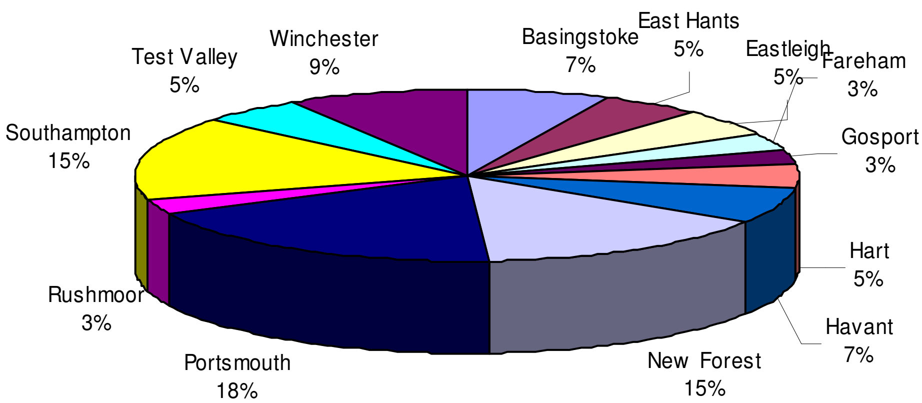
Figure v: Distribution of inbound trip nights



2.4.7 It is estimated that the expenditure associated with overseas overnight trips was somewhere in the region of £187.1 million, a marginal difference of 0.9% compared to 2006. **See table 9**

2.4.8 The model calculates that in 2008, the greatest proportion of overseas expenditure in Hampshire took place in Portsmouth (18%) followed by Southampton (15%) and the New Forest (15%).

Figure vi: Distribution of inbound trip spend



2.4.9 It is estimated that 41% of total overseas overnight trip expenditure in Hampshire was made by those staying in serviced accommodation. **See table 9**

2.4.10 Around a third (34%) of total overseas trip expenditure was made by those staying in the home of friends and relatives. Seven percent of overseas trip expenditure was made by those staying in non-serviced accommodation. **See table 9**

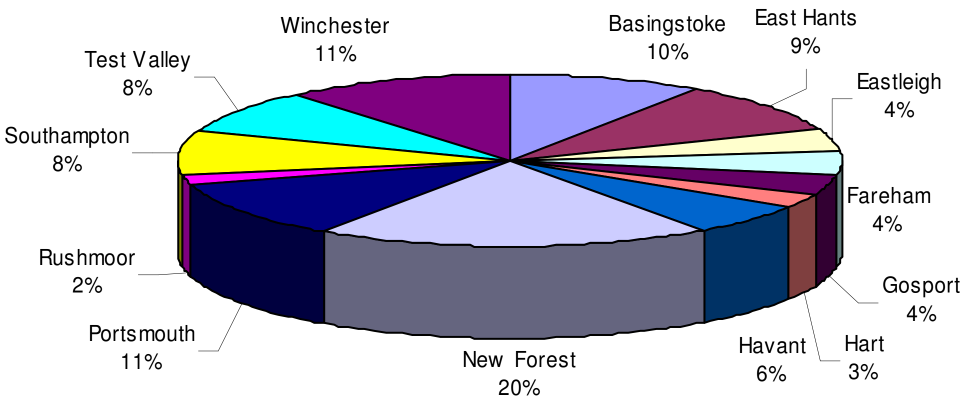
2.4.11 Reflecting their lower volumes, 4% of overseas trip expenditure was made by those staying in lodgings, 5% in hostels/campus accommodation, 6% by those staying in second homes and less than 1% by those staying on boats. **See table 9**

2.4.12 For overseas overnight visitors, the average expenditure per person is estimated to be approximately £47.39 (from £45.10 in 2006) per night and £354.13 (from £394.50 in 2006) per trip. **See table 11**

2.5 TOTAL TOURISM DAY TRIPS

2.5.1 It is estimated that approximately 37 million tourism day trips were made to and within the County for a variety of leisure purposes in 2008, representing a 3.2% increase when compared to 2004. **See table 12**

Figure vii: Distribution of tourism day trips

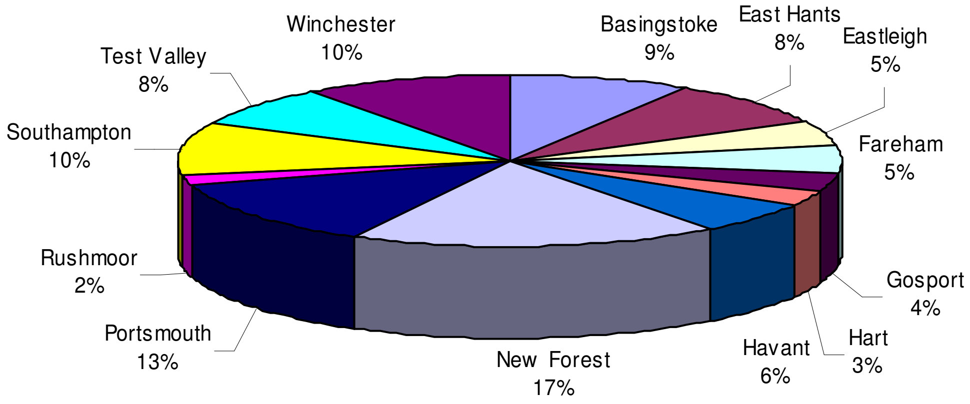


2.5.2 The largest volume of tourism day trips were made to the New Forest (20%), followed by Portsmouth (11% respectively).

2.5.3 Expenditure associated with tourism day trips is estimated to have been somewhere in the region of £1.55 billion, representing a 3.4% increase when compared to 2006.

2.5.4 The largest proportion of tourism day trip expenditure also involved trips to the New Forest (17%), followed by Portsmouth (13%).

Figure viii: Distribution of tourism day trip spend



2.6 TOTAL ALL TRIPS

2.6.1 The model calculates that in 2008 around 41.3 million trip (from 40.4 million trip in 2006) were made to Hampshire (40,417,000). Of these, 9% involved domestic overnight trips, 1% involved overseas overnight trips and 90% involved tourism day trips.

2.6.2 Despite accounting for only 9% of total trips, domestic trips contributed 25% towards total trip expenditure. Overseas trips contributed 8% towards total trip expenditure and tourism day trips contributed 67% towards total trip expenditure. In total £2,317,317,000 was generated by staying and day trips to Hampshire.

2.7 SECTOR BREAKDOWN OF TRIP EXPENDITURE

2.7.1 Unsurprisingly, the largest volume of domestic staying trip expenditure went towards the cost of accommodation (30.5%) This was followed by food and drink (21.2%) and shopping (18.5%). Nine percent of domestic staying trip expenditure went on visitor attractions and other entertainment. A fifth of domestic staying trip expenditure went towards transport costs (20.6%). **See table 15**

2.7.2 Thirty-one of overseas staying trips expenditure also involved the cost of commercial accommodation. Overseas visitors spent proportionately more on shopping than domestic visitors (26.2%). Around a fifth (206%) went towards food and drink. Thirteen percent of overseas staying trip expenditure went on visitor attractions and other entertainment. A tenth of overseas staying trip expenditure went towards transport costs (9.5%). **See table 16**

2.7.3 For tourism day trips, the largest proportion of trip expenditure involved the purchase of food and drink (38.8%) followed closely by shopping (32%). Seventeen percent of day trip expenditure went towards travel costs and a further 10.6% went towards visitor attractions and other entertainment. **See table 18**

2.7.4 Expenditure on the maintenance on second homes, expenditure on boat related repairs and up-keep and expenditure made by friends and relatives contributed a further £104,987,000 for the Hampshire visitor economy. **See table 20**

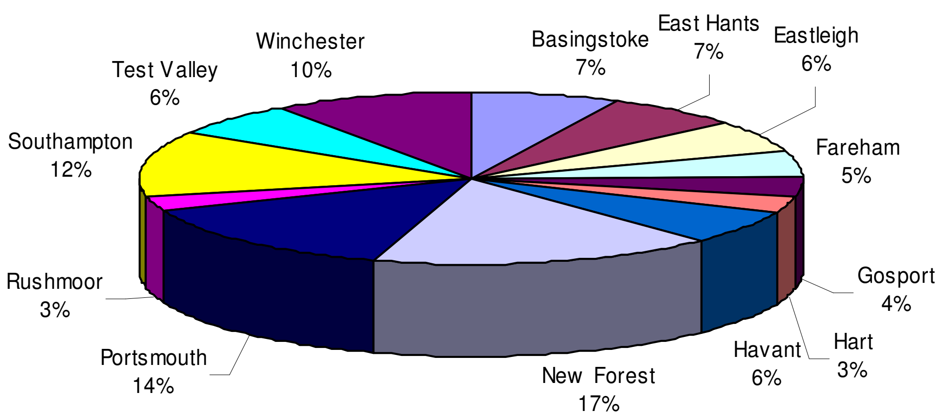
2.8 ECONOMIC IMPACT ESTIMATES

2.8.1 The model provides an estimate for the magnitude of additional business turnover generated through the impact of visitor related expenditure in Hampshire. Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. Furthermore, it is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

2.8.2 Drawing together direct and indirect/induced business turnover, the total value of visitor expenditure to the Hampshire economy in 2008 is estimated to be in the region of £2.68 million, a marginal increase of 0.6% when compared to 2006. **See table 21**

2.8.3 The distribution of business turnover across the County indicates that 17% of total turnover was received by businesses in the New Forest, 14% was received by businesses in Portsmouth, and 12% was received by businesses in Southampton.

Figure ix: Distribution of total business turnover

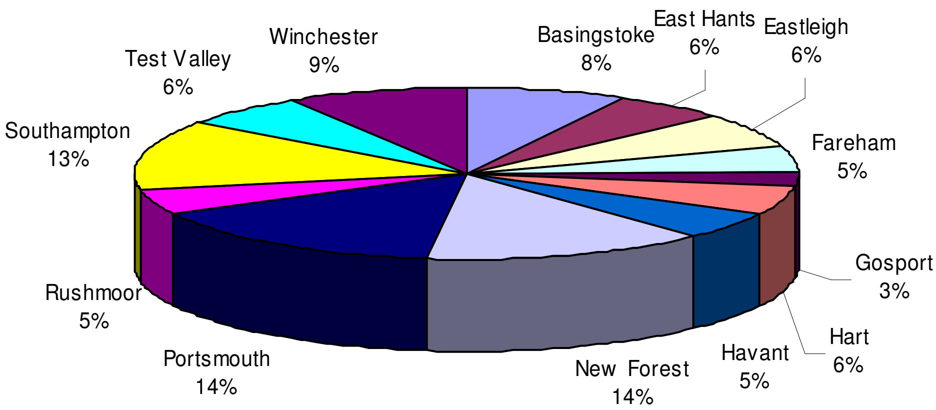


2.8.4 It is estimated that around 59,246 jobs were supported by total business turnover in 2008. The model estimates are comparable to those produced by the Office of National Statistics. ONS job estimates drawn from the Annual Business Inquiry indicate around 57,900 tourism jobs in the County of Hampshire. **See table 22**

2.8.5 Reflecting its significantly larger tourism market, the largest proportion of total employee jobs sustained in the County is in the New Forest (14%) and Portsmouth (14%).

2.8.6 Tourism employment in Hampshire accounts for 7.5% of total employment in the county.

Figure ix: Distribution of total business turnover



3. TABLES OF RESULTS

3.1 Volume of overnight trips by accommodation

Table 1: Number of overnight domestic trips by accommodation

	Basingstoke	E. Hants	Eastleigh	Fareham	Gosport	Hart	Havant	New Forest	Portsmouth	Rushmoor	Soton	Test Valley	Winchester	Hampshire	
Serviced	55,000	34,000	42,000	25,000	10,000	38,000	49,000	208,000	277,000	49,000	191,000	49,000	118,000	1,145,000	30.2%
Self catering	0	10,000	2,000	1,000	4,000	0	4,000	43,800	19,000	0	18,000	4,000	4,000	109800	2.9%
Touring/tents	1,000	2,000	1,000	14,000	7,000	0	46,000	176,800	6,000	0	1,000	11,000	8,000	273,800	7.2%
Static caravans	0	2,000	0	10,000	3,000	0	48,000	150,600	5,000	0	0	0	0	218600	5.8%
Group/campus	2,000	0	0	0	0	0	0	800	3,000	0	5,000	0	9,000	19,800	0.5%
Second homes	1,000	2,000	1,000	1,000	1,000	1,000	5,000	9,100	3,000	0	2,000	2,000	2,000	30,100	0.8%
Boat moorings	0	0	0	17,000	12,000	0	8,000	12,300	4,000	0	15,000	0	0	68,300	1.8%
Other	8,000	8,000	8,000	6,000	4,000	4,000	8,000	9,100	10,000	5,000	11,000	6,000	6,000	93,100	2.5%
Paying guests	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%
SFR	170,000	118,000	128,000	125,000	90,000	101,000	128,000	191,300	213,000	97,000	247,000	128,000	94,000	1,830,300	48.3%
2008	238,000	176,000	183,000	199,000	131,000	145,000	296,000	801,800	539,000	150,000	489,000	199,000	239,000	3,785,800	
2006	261,000	194,000	207,000	218,000	139,000	157,000	323,000	823,000	564,000	164,000	514,000	217000	240,000	4,058,000	
% change	-8.8%	-9.3%	-11.6%	-8.7%	-5.8%	-7.6%	-8.4%	-2.6%	-4.4%	-8.5%	-5%	-8.3%	-0.4%	-6.7%	

Table 2: Number of overnight inbound trips by accommodation															
	Basingstoke	E. Hants	Eastleigh	Fareham	Gosport	Hart	Havant	New Forest	Portsmouth	Rushmoor	Soton	Test Valley	Winchester	Hampshire	
Serviced	16,000	7,000	9,000	7,000	4,000	11,000	12,000	17,400	49,000	7,000	23,000	11,000	16,000	189,400	36.5%
Self catering	0	1,000	0	0	0	0	1,000	6,200	4,000	0	3,000	1,000	1,000	17200	3.3%
Touring/tents	0	0	0	1,000	0	0	2,000	9,200	0	0	0	0	1,000	13,200	2.5%
Static caravans	0	0	0	0	0	0	2,000	8,100	0	0	0	0	0	10100	1.9%
Group/campus	1,000	0	0	0	0	0	0	300	5,000	0	5,000	0	5,000	16,300	3.1%
Second homes	0	0	0	0	0	0	1,000	2,100	1,000	0	1,000	0	0	5,100	1.0%
Boat moorings	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%
Other	2,000	2,000	2,000	2,000	1,000	1,000	2,000	2,800	2,000	1,000	2,000	2,000	2,000	23,800	4.6%
Paying guests	0	2,000	0	0	0	0	0	0	2,000	0	10,000	0	4,000	18,000	3.5%
SFR	20,000	14,000	15,000	13,000	10,000	12,000	18,000	23,200	26,000	11,000	35,000	16,000	13,000	226,200	43.6%
2008	39,000	26,000	26,000	23,000	16,000	24,000	38,000	69,300	89,000	19,000	79,000	29,000	42,000	519,300	
2006	43,000	30,000	27,000	24,000	16,000	26,000	40,000	70,000	88,000	21,000	83,000	30,000	41,000	539,000	
% change	-9.3%	-13.3%	-3.7%	-4.2%	0.0%	-7.7%	-5.0%	-1.0%	1.1%	-9.5%	-5%	-3.3%	2.4%	-3.7%	

Table 3: Number of total overnight trips by accommodation

	Basingstoke	E. Hants	Eastleigh	Fareham	Gosport	Hart	Havant	New Forest	Portsmouth	Rushmoor	Soton	Test Valley	Winchester	Hampshire	
Serviced	71,000	41,000	51,000	32,000	14,000	49,000	61,000	225,400	326,000	56,000	214,000	60,000	134,000	1,334,400	31.0%
Self catering	0	11,000	2,000	1,000	4,000	0	5,000	50,000	23,000	0	21,000	5,000	5,000	127000	2.9%
Touring/tents	1,000	2,000	1,000	15,000	7,000	0	48,000	186,000	6,000	0	1,000	11,000	9,000	287,000	6.7%
Static caravans	0	2,000	0	10,000	3,000	0	50,000	158,700	5,000	0	0	0	0	228700	5.3%
Group/campus	3,000	0	0	0	0	0	0	1,100	8,000	0	10,000	0	14,000	36,100	0.8%
Second homes	1,000	2,000	1,000	1,000	1,000	1,000	6,000	11,200	4,000	0	3,000	2,000	2,000	35,200	0.8%
Boat moorings	0	0	0	17,000	12,000	0	8,000	12,300	4,000	0	15,000	0	0	68,300	1.6%
Other	10,000	10,000	10,000	8,000	5,000	5,000	10,000	11,900	12,000	6,000	13,000	8,000	8,000	116,900	2.7%
Paying guests	0	2,000	0	0	0	0	0	0	2,000	0	10,000	0	4,000	18,000	0.4%
SFR	190,000	132,000	143,000	138,000	100,000	113,000	146,000	214,500	239,000	108,000	282,000	144,000	107,000	2,056,500	47.8%
2008	277,000	202,000	209,000	222,000	147,000	169,000	334,000	871,100	628,000	169,000	568,000	228,000	281,000	4,305,100	
2006	304,000	224,000	234,000	242,000	155,000	183,000	363,000	893,000	652,000	185,000	596,595	247,000	281,000	4,559,595	
% change	-8.9%	-9.8%	-10.7%	-8.3%	-5.2%	-7.7%	-8.0%	-2.5%	-3.7%	-8.6%	-5%	-7.7%	0.0%	-5.6%	

3.2 Volume of tourism nights by accommodation

Table 4: Number of domestic nights by accommodation

	Basingstoke	E. Hants	Eastleigh	Fareham	Gosport	Hart	Havant	New Forest	Portsmouth	Rushmoor	Soton	Test Valley	Winchester	Hampshire	
Serviced	114,000	70,000	87,000	52,000	21,000	78,000	100,000	416,000	569,000	100,000	391,000	100,000	242,000	2,340,000	20.8%
Self catering	1,000	66,000	16,000	4,000	26,000	1,000	29,000	197,000	132,000	0	119,000	30,000	24,000	645000	5.7%
Touring/tents	2,000	10,000	7,000	65,000	33,000	0	212,000	816,000	26,000	0	2,000	49,000	38,000	1,260,000	11.2%
Static caravans	2,000	10,000	2,000	49,000	12,000	0	231,000	730,000	24,000	0	0	0	0	1060000	9.4%
Group/campus	5,000	0	1,000	0	0	0	0	2,000	7,000	0	14,000	0	24,000	53,000	0.5%
Second homes	11,000	12,000	7,000	8,000	11,000	7,000	41,000	45,000	20,000	3,000	13,000	12,000	12,000	202,000	1.8%
Boat moorings	0	0	0	39,000	27,000	0	18,000	29,000	10,000	0	36,000	0	0	159,000	1.4%
Other	60,000	63,000	60,000	44,000	8,000	34,000	60,000	16,000	75,000	37,000	86,000	48,000	47,000	638,000	5.7%
Paying guests	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%
SFR	458,000	317,000	343,000	337,000	243,000	272,000	343,000	515,000	572,000	260,000	663,000	343,000	252,000	4,918,000	43.6%
2008	653,000	548,000	522,000	598,000	382,000	392,000	1,033,000	2,768,000	1,434,000	399,000	1,325,000	582,000	637,000	11,273,000	
2006	685,000	522,000	553,000	607,000	378,000	408,000	1,016,000	2,519,000	1,373,000	422,000	1,287,000	579,000	597,000	10,946,000	
% change	-4.7%	5.0%	-5.6%	-1.5%	1.1%	-3.9%	1.7%	9.9%	4.4%	-5.5%	3%	0.5%	6.7%	3.0%	

Table 5: Number of inbound trip nights by accommodation

	Basingstoke	E. Hants	Eastleigh	Fareham	Gosport	Hart	Havant	New Forest	Portsmouth	Rushmoor	Soton	Test Valley	Winchester	Hampshire	
Serviced	56,000	26,000	32,000	19,000	16,000	40,000	42,000	63,000	176,000	20,000	83,000	38,000	56,000	667,000	17.4%
Self catering	1,000	30,000	9,000	1,000	11,000	1,000	16,000	163,000	109,000	0	47,000	15,000	20,000	423000	11.0%
Touring/tents	0	0	1,000	3,000	1,000	0	10,000	41,000	2,000	0	0	2,000	2,000	62,000	1.6%
Static caravans	0	0	0	0	0	0	6,000	50,000	1,000	0	0	0	0	57000	1.5%
Group/campus	7,000	0	1,000	0	0	0	0	3,000	61,000	0	24,000	0	61,000	157,000	4.1%
Second homes	3,000	3,000	2,000	2,000	3,000	2,000	11,000	33,000	13,000	1,000	16,000	3,000	3,000	95,000	2.5%
Boat moorings	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%
Other	9,000	7,000	7,000	7,000	5,000	6,000	10,000	12,000	7,000	6,000	9,000	7,000	7,000	99,000	2.6%
Paying guests	0	21,000	0	0	0	0	2,000	0	21,000	0	94,000	0	43,000	181,000	4.7%
SFR	187,000	125,000	135,000	123,000	89,000	107,000	169,000	214,000	237,000	102,000	324,000	147,000	121,000	2,080,000	54.3%
2008	265,000	214,000	187,000	156,000	126,000	155,000	268,000	579,000	627,000	129,000	597,000	213,000	313,000	3,829,000	
2006	293,000	234,000	230,000	167,000	131,000	168,000	294000	662,000	710000	137,000	596,000	223,000	339,000	4,184,000	
% change	-9.6%	-8.5%	-18.7%	-6.6%	-3.8%	-7.7%	-8.8%	-12.5%	-11.7%	-5.8%	0.2%	-4.5%	-7.7%	-8.5%	

Table 6: Number of total nights by accommodation

	Basingstoke	E. Hants	Eastleigh	Fareham	Gosport	Hart	Havant	New Forest	Portsmouth	Rushmoor	Soton	Test Valley	Winchester	Hampshire	
Serviced	170,000	96,000	119,000	71,000	37,000	118,000	142,000	479,000	745,000	120,000	474,000	138,000	298,000	3,007,000	19.9%
Self catering	2,000	96,000	25,000	5,000	37,000	2,000	45,000	360,000	241,000	0	166,000	45,000	44,000	1068000	7.1%
Touring/tents	2,000	10,000	8,000	68,000	34,000	0	222,000	857,000	28,000	0	2,000	51,000	40,000	1,322,000	8.8%
Static caravan	2,000	10,000	2,000	49,000	12,000	0	237,000	780,000	25,000	0	0	0	0	1117000	7.4%
Group/campus	12,000	0	2,000	0	0	0	0	5,000	68,000	0	38,000	0	85,000	210,000	1.4%
Second home	14,000	15,000	9,000	10,000	14,000	9,000	52,000	78,000	33,000	4,000	29,000	15,000	15,000	297,000	2.0%
Boat moorings	0	0	0	39,000	27,000	0	18,000	29,000	10,000	0	36,000	0	0	159,000	1.1%
Other	69,000	70,000	67,000	51,000	13,000	40,000	70,000	28,000	82,000	43,000	95,000	55,000	54,000	737,000	4.9%
Paying guests	0	21,000	0	0	0	0	2,000	0	21,000	0	94,000	0	43,000	181,000	1.2%
SFR	645,000	442,000	478,000	460,000	332,000	379,000	512,000	729,000	809,000	362,000	987,000	490,000	373,000	6,998,000	46.3%
2008	918,000	762,000	709,000	754,000	508,000	547,000	1,301,000	3,347,000	2,061,000	528,000	1,922,000	795,000	950,000	15,102,000	
2006	978,000	756000	783,000	774,000	509,000	576,000	1,310,000	3,181,000	2083000	559,000	1,883,000	802,000	936,000	15,130,000	
% change	-6.1%	0.8%	-9.5%	-2.6%	-0.2%	-5.0%	-0.7%	5.2%	-1.1%	-5.5%	2.1%	-0.9%	1.5%	-0.2%	

3.3 Average length of stay

Table 7: Average length of trip

	Domestic		Overseas	
	2008	2006	2008	2006
Basingstoke	2.74	2.63	6.79	6.74
East Hampshire	3.11	2.70	8.23	7.73
Eastleigh	2.86	2.68	7.19	8.52
Fareham	2.98	2.79	7.17	6.92
Gosport	3.07	2.72	7.88	8.17
Hart	2.41	2.60	5.73	6.46
Havant	3.49	3.17	7.05	7.35
New Forest	3.67	3.06	8.02	9.46
Portsmouth	2.66	2.43	7.04	8.07
Rushmoor	2.66	2.57	6.90	6.52
Southampton	2.71	2.50	7.56	7.18
Test Valley	2.92	2.67	7.34	7.43
Winchester	2.67	2.49	7.45	8.27
Hampshire	3.00	2.72	7.08	7.75

3.4 Value of overnight trips by accommodation

Table 8: Domestic trip expenditure by accommodation

	Basingstoke	E. Hants	Eastleigh	Fareham	Gosport	Hart	Havant	New Forest	Portsmouth	Rushmoor	Soton	Test Valley	Winchester	Hampshire	
Serviced	£11,657,000	£6,742,000	£8,816,000	£4,970,000	£1,791,000	£7,509,000	£8,791,000	£40,960,000	£54,613,000	£10,076,000	£40,317,000	£9,557,000	£23,211,000	£229,010,000	40.4%
Self catering	£118,000	£5,886,000	£1,472,000	£353,000	£2,355,000	£59,000	£1,611,000	£14,876,000	£11,773,000	£0	£10,596,000	£2,649,000	£2,119,000	£53,867,000	9.5%
Touring/tents	£60,000	£242,000	£161,000	£1,613,000	£806,000	£12,000	£5,241,000	£20,158,000	£645,000	£0	£60,000	£1,477,000	£935,000	£31,410,000	5.5%
Static caravans	£148,000	£791,000	£148,000	£3,956,000	£989,000	£0	£12,980,000	£38,120,000	£1,978,000	£0	£0	£0	£0	£59110000	10.4%
Group/campus	£80,000	£0	£11,000	£0	£0	£0	£0	£36,000	£114,000	£0	£229,000	£0	£379,000	£849,000	0.1%
Second home	£513,000	£296,000	£230,000	£200,000	£286,000	£175,000	£1,021,000	£1,709,000	£496,000	£71,000	£331,000	£302,000	£292,000	£5,922,000	1.0%
Boat moorings	£0	£0	£0	£1,551,000	£1,073,000	£0	£710,000	£1,146,000	£384,000	£0	£1,438,000	£0	£0	£6,302,000	1.1%
Other	£1,129,000	£1,199,000	£1,129,000	£832,000	£160,000	£649,000	£1,129,000	£1,340,000	£1,411,000	£705,000	£1,636,000	£917,000	£884,000	£13,120,000	2.3%
Paying guests	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	0.0%
SFR	£16,459,000	£10,459,000	£11,316,000	£11,119,000	£8,009,000	£10,323,000	£11,307,000	£16,960,000	£18,845,000	£10,392,000	£21,860,000	£11,307,000	£8,292,000	£166,648,000	29.4%
2008	£30,165,000	£25,616,000	£23,285,000	£24,593,000	£15,469,000	£18,727,000	£42,790,000	£135,304,000	£90,259,000	£21,245,000	£76,468,000	£26,209,000	£36,111,000	£566,241,000	
2006	£32,793,000	£24,000,000	£25,907,000	£25,975,000	£15,187,000	£20,328,000	£41,504,000	£127,109,000	£96,283,000	£24,365,000	£78,894,000	£28,673,000	£34,761,000	£575,779,000	
% change	-8.0%	6.7%	-10.1%	-5.3%	1.9%	-7.9%	3%	6.4%	-6.3%	-12.8%	-3%	-8.6%	3.9%	-1.7%	

Table 9: Inbound trip expenditure by accommodation

	Basingstoke	E. Hants	Eastleigh	Fareham	Gosport	Hart	Havant	New Forest	Portsmouth	Rushmoor	Soton	Test Valley	Winchester	Hampshire	
Serviced	£5,094,000	£2,176,000	£3,478,000	£1,680,000	£1,273,000	£4,321,000	£3,884,000	£5,667,000	£15,919,000	£2,050,000	£8,386,000	£3,240,000	£5,601,000	£62,769,000	41%
Self catering	£54,000	£1,225,000	£436,000	£57,000	£445,000	£27,000	£817,000	£8,173,000	£5,449,000	£0	£2,366,000	£466,000	£981,000	£20,496,000	6%
Touring/tents	£3,000	£9,000	£12,000	£65,000	£20,000	£1,000	£197,000	£787,000	£31,000	£0	£4,000	£40,000	£46,000	£1,215,000	1%
Static caravans	£3,000	£10,000	£13,000	£0	£18,000	£0	£289,000	£2,396,000	£43,000	£0	£0	£0	£0	£2,772,000	0%
Group/campus	£343,000	£0	£48,000	£0	£0	£0	£0	£153,000	£2,940,000	£0	£862,000	£0	£2,940,000	£7,286,000	5%
Second homes	£169,000	£175,000	£98,000	£118,000	£169,000	£104,000	£605,000	£1,728,000	£691,000	£42,000	£1,061,000	£136,000	£173,000	£5,269,000	6%
Boat moorings	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	0%
Other	£249,000	£70,000	£196,000	£178,000	£77,000	£150,000	£261,000	£310,000	£196,000	£161,000	£246,000	£69,000	£175,000	£2,338,000	1%
Paying guests	£0	£1,077,000	£0	£0	£0	£0	£108,000	£0	£1,077,000	£0	£5,343,000	£0	£2,153,000	£9,758,000	4%
SFR	£7,052,000	£4,716,000	£5,233,000	£4,273,000	£2,730,000	£4,036,000	£6,373,000	£8,072,000	£8,922,000	£3,152,000	£10,574,000	£5,523,000	£4,557,000	£75,213,000	34%
2008	£12,968,000	£9,458,000	£9,513,000	£6,372,000	£4,732,000	£8,638,000	£12,532,000	£27,286,000	£35,266,000	£5,405,000	£28,843,000	£9,474,000	£16,625,000	£187,112,000	
2006	£13,057,000	£9,069,000	£10,659,000	£6,316,000	£4,628,000	£8,778,000	£13,724,000	£26,887,000	£35,725,000	£5,812,000	£27,691,000	£9,177,000	£17,215,000	£188,738,000	
% change	-0.7%	4.3%	-10.8%	0.9%	2.2%	-1.6%	-8.7%	1.5%	-1.3%	-7.0%	4.2%	3.2%	-3.4%	-0.9%	

Table 10: Total trip expenditure by accommodation

	Basingstoke	E. Hants	Eastleigh	Fareham	Gosport	Hart	Havant	New Forest	Portsmouth	Rushmoor	Soton	Test Valley	Winchester	Hampshire	
Serviced	£16,751,000	£8,918,000	£12,294,000	£6,650,000	£3,064,000	£11,830,000	£12,675,000	£45,628,000	£70,532,000	£12,126,000	£48,703,000	£12,797,000	£28,812,000	290,780,000	38.6%
Self catering	£172,000	£7,111,000	£1,908,000	£410,000	£2,800,000	£86,000	£2,428,000	£19,313,000	£17,222,000	£0	£12,962,000	£3,115,000	£3,100,000	70627000	9.4%
Touring/tents	£63,000	£251,000	£173,000	£1,678,000	£826,000	£13,000	£5,438,000	£25,934,000	£676,000	£0	£64,000	£1,517,000	£981,000	37,614,000	5.0%
Static caravan	£151,000	£801,000	£161,000	£3,956,000	£1,007,000	£0	£13,269,000	£40,516,000	£2,021,000	£0	£0	£0	£0	61882000	8.2%
Group/campus	£423,000	£0	£59,000	£0	£0	£0	£0	£189,000	£3,054,000	£0	£1,091,000	£0	£3,319,000	8,135,000	1.1%
Second home	£682,000	£471,000	£328,000	£318,000	£455,000	£279,000	£1,626,000	£4,003,000	£1,187,000	£113,000	£1,392,000	£438,000	£465,000	11,757,000	1.6%
Boat moorings	£0	£0	£0	£1,551,000	£1,073,000	£0	£710,000	£1,146,000	£384,000	£0	£1,438,000	£0	£0	6,302,000	0.8%
Other	£1,378,000	£1,269,000	£1,325,000	£1,010,000	£237,000	£799,000	£1,390,000	£618,000	£1,607,000	£866,000	£1,882,000	£986,000	£1,059,000	14,426,000	1.9%
Paying guests	£0	£1,077,000	£0	£0	£0	£0	£108,000	£0	£1,077,000	£0	£5,343,000	£0	£2,153,000	9,758,000	1.3%
SFR	£23,511,000	£15,175,000	£16,549,000	£15,392,000	£10,739,000	£14,359,000	£17,680,000	£25,032,000	£27,767,000	£13,544,000	£32,434,000	£16,830,000	£12,849,000	241,861,000	32.1%
2008	£43,133,000	£35,074,000	£32,798,000	£30,965,000	£20,201,000	£27,365,000	£55,322,000	£162,379,000	£125,525,000	£26,650,000	£105,311,000	£35,683,000	£52,736,000	753,142,000	
2006	£45,850,000	£33,069,000	£36,566,000	£32,291,000	£19,815,000	£29,106,000	£55,228,000	£153,996,000	£132,008,000	£30,177,000	£106,585,000	£37,850,000	£51,976,000	764,517,000	
% change	-5.9%	6.1%	-10.3%	-4.1%	1.9%	-6.0%	0.2%	5.4%	-4.9%	-11.7%	-1.2%	-5.7%	1.5%	-1.5%	

3.5 Average trip expenditure

Table 11: Average trip expenditure

	Average trip expenditure per person per night		Average trip expenditure per person per trip	
	Domestic	Overseas	Domestic	Overseas
Basingstoke	£46.19	£48.94	£126.74	£332.51
East Hampshire	£46.74	£44.20	£145.55	£363.77
Eastleigh	£44.61	£50.87	£127.24	£365.88
Fareham	£41.13	£40.85	£123.58	£277.04
Gosport	£40.49	£37.56	£118.08	£295.75
Hart	£47.77	£55.73	£129.15	£359.92
Havant	£41.42	£46.76	£144.56	£329.79
New Forest	£48.81	£47.13	£168.49	£393.74
Portsmouth	£62.94	£56.25	£167.46	£396.25
Rushmoor	£53.25	£41.90	£141.63	£284.47
Southampton	£57.71	£48.31	£156.38	£365.10
Test Valley	£45.03	£44.48	£131.70	£326.69
Winchester	£56.69	£53.12	£151.09	£395.83
Hampshire 2008 avg.	£48.68	£47.39	£140.90	£345.13
Hampshire 2006 avg.	£52.73	£45.10	£143.63	£394.50

3.6 Tourism day trips

Table 12: Number of tourism day trips

	2008	2006	% change
Basingstoke	3,519,000	3,518,000	0.0%
East Hampshire	3,502,000	3,290,000	6.4%
Eastleigh	1,661,000	1,574,000	5.5%
Fareham	1,641,000	1,611,000	1.9%
Gosport	1,316,000	1,241,000	6.0%
Hart	986,000	959,000	2.8%
Havant	2,162,000	2,089,000	3.5%
New Forest	7,175,000	6,975,000	2.9%
Portsmouth	4,123,000	3,923,000	5.1%
Rushmoor	622,000	612,000	1.6%
Southampton	3,061,000	2,940,000	4.1%
Test Valley	3,160,000	3,117,000	1.4%
Winchester	4,088,000	4,006,000	2.0%
Hampshire	37,016,000	35,855,000	3.2%

Table 13: Tourism day trip expenditure			
	2008	2006	% change
Basingstoke	£138,307,000	£138,281,000	0.0%
East Hampshire	£132,095,000	£125,180,000	5.5%
Eastleigh	£75,746,000	£71,332,000	6.2%
Fareham	£75,982,000	£73,030,000	4.0%
Gosport	£58,437,000	£55,466,000	5.4%
Hart	£41,666,000	£40,316,000	3.3%
Havant	£95,712,000	£92,816,000	3.1%
New Forest	£277,755,000	£271,231,000	2.4%
Portsmouth	£195,724,000	£185,610,000	5.4%
Rushmoor	£30,581,000	£30,075,000	1.7%
Southampton	£154,520,000	£148,401,000	4.1%
Test Valley	£119,250,000	£117,569,000	1.4%
Winchester	£158,272,000	£154,125,000	2.7%
Hampshire	£1,554,047,000	£1,503,432,000	3.4%

Table 14: Average day trip expenditure per person	
Basingstoke	£39.30
East Hampshire	£37.72
Eastleigh	£45.60
Fareham	£46.30
Gosport	£44.41
Hart	£42.26
Havant	£44.27
New Forest	£38.71
Portsmouth	£47.47
Rushmoor	£49.17
Southampton	£50.48
Test Valley	£37.74
Winchester	£38.72
Hampshire	£41.98

3.7 Breakdown of expenditure associated with trips

Table 15: Breakdown of overnight domestic trip expenditure by business sector

	Accommodation	Retail	Catering	Attractions	Travel	Total
Basingstoke	£8,557,000	£5,970,000	£6,441,000	£2,764,000	£6,432,000	£30,164,000
East Hampshire	£6,856,000	£5,357,000	£5,704,000	£2,542,000	£5,157,000	£25,616,000
Eastleigh	£6,818,000	£4,466,000	£4,887,000	£2,068,000	£5,045,000	£23,284,000
Fareham	£6,902,000	£4,930,000	£5,360,000	£2,354,000	£5,047,000	£24,593,000
Gosport	£4,038,000	£3,303,000	£3,483,000	£1,564,000	£3,080,000	£15,468,000
Hart	£5,287,000	£3,726,000	£4,023,000	£1,737,000	£3,954,000	£18,727,000
Havant	£12,338,000	£8,403,000	£9,461,000	£4,257,000	£8,330,000	£42,789,000
New Forest	£41,011,000	£25,271,000	£29,783,000	£13,532,000	£25,495,000	£135,092,000
Portsmouth	£30,318,000	£14,820,000	£18,079,000	£7,503,000	£19,539,000	£90,259,000
Rushmoor	£6,280,000	£4,041,000	£4,472,000	£1,905,000	£4,546,000	£21,244,000
Southampton	£25,204,000	£12,835,000	£15,249,000	£6,249,000	£16,931,000	£76,468,000
Test Valley	£7,336,000	£5,266,000	£5,712,000	£2,507,000	£5,388,000	£26,209,000
Winchester	£11,873,000	£6,104,000	£7,357,000	£3,101,000	£7,675,000	£36,110,000
Hampshire	£172,818,000	£104,492,000	£120,011,000	£52,083,000	£116,619,000	£566,023,000
%	30.5%	18.5%	21.2%	9.2%	20.6%	

Table 16: Breakdown of overnight inbound trip expenditure by business sector

	Accommodation	Retail	Catering	Attractions	Travel	Total
Basingstoke	£3,940,000	£3,284,000	£2,926,000	£1,456,000	£1,362,000	£12,968,000
East Hampshire	£2,416,000	£2,823,000	£1,951,000	£1,395,000	£873,000	£9,458,000
Eastleigh	£6,415,000	£5,408,000	£3,473,000	£2,826,000	£1,529,000	£19,651,000
Fareham	£1,765,000	£1,764,000	£1,335,000	£895,000	£612,000	£6,371,000
Gosport	£1,005,000	£1,546,000	£982,000	£767,000	£431,000	£4,731,000
Hart	£2,467,000	£2,383,000	£1,789,000	£1,183,000	£816,000	£8,638,000
Havant	£3,493,000	£3,552,000	£2,674,000	£1,610,000	£1,204,000	£12,533,000
New Forest	£7,388,000	£7,956,000	£6,030,000	£3,234,000	£2,678,000	£27,286,000
Portsmouth	£12,583,000	£8,127,000	£7,032,000	£4,217,000	£3,307,000	£35,266,000
Rushmoor	£1,659,000	£1,395,000	£1,099,000	£741,000	£511,000	£5,405,000
Southampton	£10,148,000	£6,634,000	£5,839,000	£3,463,000	£2,759,000	£28,843,000
Test Valley	£2,505,000	£2,663,000	£2,204,000	£1,097,000	£1,004,000	£9,473,000
Winchester	£5,521,000	£4,165,000	£3,377,000	£2,008,000	£1,554,000	£16,625,000
Hampshire	£61,305,000	£51,700,000	£40,711,000	£24,892,000	£18,640,000	£197,248,000
%	31.1%	26.2%	20.6%	12.6%	9.5%	

Table 17: Breakdown of all staying trip expenditure by business sector

	Accommodation	Retail	Catering	Attractions	Travel	Total
Basingstoke	£12,497,000	£9,254,000	£9,367,000	£4,220,000	£7,794,000	£43,132,000
East Hampshire	£9,272,000	£8,180,000	£7,655,000	£3,937,000	£6,030,000	£35,074,000
Eastleigh	£13,233,000	£9,874,000	£8,360,000	£4,894,000	£6,574,000	£42,935,000
Fareham	£8,667,000	£6,694,000	£6,695,000	£3,249,000	£5,659,000	£30,964,000
Gosport	£5,043,000	£4,849,000	£4,465,000	£2,331,000	£3,511,000	£20,199,000
Hart	£7,754,000	£6,109,000	£5,812,000	£2,920,000	£4,770,000	£27,365,000
Havant	£15,831,000	£11,955,000	£12,135,000	£5,867,000	£9,534,000	£55,322,000
New Forest	£48,399,000	£33,227,000	£35,813,000	£16,766,000	£28,173,000	£162,378,000
Portsmouth	£42,901,000	£22,947,000	£25,111,000	£11,720,000	£22,846,000	£125,525,000
Rushmoor	£7,939,000	£5,436,000	£5,571,000	£2,646,000	£5,057,000	£26,649,000
Southampton	£35,352,000	£19,469,000	£21,088,000	£9,712,000	£19,690,000	£105,311,000
Test Valley	£9,841,000	£7,929,000	£7,916,000	£3,604,000	£6,392,000	£35,682,000
Winchester	£17,394,000	£10,269,000	£10,734,000	£5,109,000	£9,229,000	£52,735,000
Hampshire	£234,123,000	£156,192,000	£160,722,000	£76,975,000	£135,259,000	£763,271,000
%	30.7%	20.5%	21.1%	10.1%	17.7%	

Table 18: Breakdown of tourism day trip expenditure by business sector

	Retail	Catering	Attractions	Travel	Total
Basingstoke	£42,344,000	£53,512,000	£13,416,000	£29,035,000	£138,307,000
East Hampshire	£36,831,000	£51,979,000	£12,813,000	£30,472,000	£132,095,000
Eastleigh	£29,988,000	£27,668,000	£7,347,000	£10,742,000	£75,745,000
Fareham	£26,009,000	£30,964,000	£9,073,000	£9,936,000	£75,982,000
Gosport	£17,093,000	£25,235,000	£7,527,000	£8,583,000	£58,438,000
Hart	£14,659,000	£15,663,000	£4,042,000	£7,303,000	£41,667,000
Havant	£28,928,000	£40,596,000	£11,939,000	£14,250,000	£95,713,000
New Forest	£69,772,000	£117,062,000	£31,464,000	£59,457,000	£277,755,000
Portsmouth	£73,256,000	£76,564,000	£22,081,000	£23,823,000	£195,724,000
Rushmoor	£13,336,000	£10,874,000	£2,966,000	£3,404,000	£30,580,000
Southampton	£69,554,000	£54,423,000	£14,988,000	£15,554,000	£154,519,000
Test Valley	£33,283,000	£46,916,000	£11,567,000	£27,484,000	£119,250,000
Winchester	£46,894,000	£61,613,000	£15,352,000	£34,412,000	£158,271,000
Hampshire	£469,872,000	£570,291,000	£156,268,000	£254,649,000	£1,468,474,000
%	32.0%	38.8%	10.6%	17.3%	

Table 19: Breakdown of TOTAL trip expenditure by business sector

	Accommodation	Retail	Catering	Attractions	Travel	Total 2008	Total 2006	% change
Basingstoke	£12,497,000	£51,598,000	£62,879,000	£17,636,000	£36,829,000	£181,439,000	£184,132,000	-1.5%
East Hampshire	£9,272,000	£45,011,000	£59,634,000	£16,750,000	£36,502,000	£167,169,000	£158,197,000	5.7%
Eastleigh	£13,233,000	£39,862,000	£36,028,000	£12,241,000	£17,316,000	£118,680,000	£118,560,000	0.1%
Fareham	£8,667,000	£32,703,000	£37,659,000	£12,322,000	£15,595,000	£106,946,000	£105,319,000	1.5%
Gosport	£5,043,000	£21,942,000	£29,700,000	£9,858,000	£12,094,000	£78,637,000	£75,283,000	4.5%
Hart	£7,754,000	£20,768,000	£21,475,000	£6,962,000	£12,073,000	£69,032,000	£69,422,000	-0.6%
Havant	£15,831,000	£40,883,000	£52,731,000	£17,806,000	£23,784,000	£151,035,000	£148,045,000	2.0%
New Forest	£48,399,000	£102,999,000	£152,875,000	£48,230,000	£87,630,000	£440,133,000	£425,227,000	3.5%
Portsmouth	£42,901,000	£96,203,000	£101,675,000	£33,801,000	£46,669,000	£321,249,000	£317,618,000	1.1%
Rushmoor	£7,939,000	£18,772,000	£16,445,000	£5,612,000	£8,461,000	£57,229,000	£60,253,000	-5.0%
Southampton	£35,352,000	£89,023,000	£75,511,000	£24,700,000	£35,244,000	£259,830,000	£254,986,000	1.9%
Test Valley	£9,841,000	£41,212,000	£54,832,000	£15,171,000	£33,876,000	£154,932,000	£155,420,000	-0.3%
Winchester	£17,394,000	£57,163,000	£72,347,000	£20,461,000	£43,641,000	£211,006,000	£206,100,000	2.4%
Hampshire	£234,123,000	£658,139,000	£773,791,000	£241,550,000	£409,714,000	£2,317,317,000	£2,278,562,000	1.7%
	10.1%	28.4%	33.4%	10.4%	17.7%			

3.8 Additional expenditure associated with tourism activity

Table 20: Additional tourism related expenditure	
Basingstoke	£9,494,000
East Hampshire	£6,481,000
Eastleigh	£5,483,000
Fareham	£10,226,000
Gosport	£4,963,000
Hart	£5,637,000
Havant	£9,011,000
New Forest	£10,509,000
Portsmouth	£11,677,000
Rushmoor	£5,342,000
Southampton	£13,715,000
Test Valley	£7,161,000
Winchester	£5,288,000
Hampshire	£104,987,000

3.9 Business turnover

Table 21: Total business turnover supported by visitor expenditure

	Direct	Supplier and income induced	Total 2008	Total 2006	% change
Basingstoke	£176,202,000	£22,016,000	£198,218,000	£205,837,000	-3.7%
East Hampshire	£158,009,000	£22,370,000	£180,379,000	£159,700,000	12.9%
Eastleigh	£117,237,000	£41,278,000	£158,515,000	£155,865,000	1.7%
Fareham	£110,935,000	£23,971,000	£134,906,000	£130,498,000	3.4%
Gosport	£78,260,000	£17,597,000	£95,857,000	£89,138,000	7.5%
Hart	£70,810,000	£15,322,000	£86,132,000	£82,608,000	4.3%
Havant	£149,719,000	£19,598,000	£169,317,000	£166,657,000	1.6%
New Forest	£393,251,000	£64,426,000	£457,677,000	£440,804,000	3.8%
Portsmouth	£312,727,000	£73,797,000	£386,524,000	£372,554,000	3.7%
Rushmoor	£59,189,000	£17,514,000	£76,703,000	£73,317,000	4.6%
Southampton	£259,448,000	£64,931,000	£324,379,000	£306,030,000	6.0%
Test Valley	£148,543,000	£28,135,000	£176,678,000	£175,760,000	0.5%
Winchester	£198,839,000	£41,149,000	£239,988,000	£228,576,000	5.0%
Hampshire	£2,232,199,000	£453,774,000	£2,687,123,000	£2,669,344,000	0.6%

3.10 Employment supported by tourism spending

Table 22: Total employment supported by visitor expenditure

	Total Jobs	ONS estimates
Basingstoke	3,897	4,500
East Hampshire	3,371	3,200
Eastleigh	3,113	3,700
Fareham	2,990	2,900
Gosport	1,639	1,500
Hart	1,151	3,200
Havant	2,955	3,000
New Forest	10,177	8,100
Portsmouth	10,142	8,800
Rushmoor	1,202	2,700
Southampton	7,968	7,600
Test Valley	3,175	3,500
Winchester	4,466	5,200
Hampshire	56,246	57,900

Source: ONS annual business inquiry employee analysis
Tourism consists of industries that are also part of the services industry (see the definitions below)
Employee jobs excludes self-employed, government-supported trainees and HM Forces

***Tourism-related** includes the following sectors:*
551 Hotels
52 Camping sites etc
553 Restaurants
554 Bars
633 Activities of travel agencies etc
925 Library, archives, museums etc
926 Sporting activities
927 Other recreational activities

Glossary of terms

Overnight trips

Overnight trips comprise a visit which involves a stay away from home of at least one night. The study measures trips, rather than visitors as one visitor may make multiple trips to an area in a given period.

Tourism day trips

It should be noted that with the Leisure Day Visits Survey, the definition of tourism day trip changed in 2002 from trips defined as lasting at least three hours or more and involving travel of over 20 miles to trips lasting three hours or more and which are not taken on a regular basis. It is difficult to gage what implication this change in definition has on total volume and whether comparisons with previous estimates are valid.

VFR Trips

VFR trips are defined as a visit where the main purpose is visiting friends and relatives. Whilst many trips to visit friends and relatives will be accommodated in the homes of these friends/ relatives, some will make use of other forms of accommodation. It should be also noted that other forms of trip, for instance for holiday or business purposes may stay with friends and relatives rather than in commercial accommodation.

Additional trip-related expenditure

Apart from the spending associated with the individual trips, additional ongoing expenditure will take place on accommodation in the case of visitors overnight at second homes or private boats, or/and additional spending by non visitors e.g. friends and relatives with whom the visitor is visiting and/or overnight with will also take place, e.g. taking visitors out for a meal.

Economic multiplier

Multipliers are used to estimate the economic impact of visitor expenditure. Visitor expenditure produces three effects. Direct effects are changes in the business sector directly receiving visitor expenditure. For instance, visitors overnight in a hotel will directly increase revenue and the number of jobs in the hotel sector. Indirect effects are the changes in supplier businesses. For example, these indirect effects would be hotels purchasing more linen from local suppliers as a result of increased business. Induced effects are changes in local economic activity resulting from household spending. For instance, employees of the hotel and linen supplier spend their wages in the local area, resulting in more sales, income and jobs in the area.

Full Time Equivalent Jobs (FTE)

For the purposes of the Model, a FTE is defined by the average annual salary plus employment costs in the sector concerned.

Direct jobs

Jobs directly generated in those local businesses in which visitors spend money, i.e. hotels, catering establishments.

Actual Jobs

Many jobs are seasonal or part-time in their nature in the tourism sector, so an adjustment is made to calculate the actual number of jobs from the number of FTEs. The adjustment made is based on the findings of surveys of tourism related businesses, and national employment surveys.

United Kingdom Tourism Survey (UKTS)

The United Kingdom Tourism Survey is undertaken by BRMB for VisitBritain and is based on 1,000 telephone interviews per week (50,000 annually). It provides basic headline data on the volume and value of domestic tourism at a national, regional and county level.

International Passenger Survey (IPS)

The International Passenger Survey is conducted by Office for National Statistics and is based on face-to-face interviews with a sample of passengers travelling via the principal airports, sea routes and the Channel Tunnel, together with visitors crossing the land border into Northern Ireland. Around 210,000 interviews are undertaken each year. IPS provides headline figures, based on the county or unitary authority, for the volume and value of overseas trips to the UK.

England Leisure Visits Survey (ELVS)

The leisure day visits survey was last conducted in 2005 and covered approximately 5,000 respondent interviews. Unlike the IPS and UKTS, this survey is not undertaken on an ongoing basis and thus adjustments are made in the model to account for annual increments in the value and volume based on trends observed in 2005.

United Kingdom Occupancy Survey (UKOS)

As part of the EU Directive on Tourism Statistics adopted in 1995, the UK must report regularly on a specified range of statistics to Eurostat, the official statistical office of the European Union. Included in these statistics are monthly occupancy rates for UK serviced accommodation. The responsibility for providing this data lies with the four National Tourist Boards, and across England the survey is undertaken by the Regional Tourist Boards. A sample of establishments are recruited to the survey and asked to complete a data form each month, giving details of their nightly occupancy. The data form is processed and analysed to produce monthly occupancy rates for the whole of the area and for specific categories of type, size, location etc.

Annual Survey of Hours and Earnings (ASHE)

AHSE proves information on wage levels by industry sector and occupation. The coverage of full-time adult employees is virtually complete, and consequently the survey is representative of hours worked for full-time employees on adult rates of pay (although the survey is currently not weighted). The coverage of part-time employees is not comprehensive, as some part-time workers will have earnings below the income tax threshold. The ASHE is the best source for estimating full time earnings.

Labour Force Survey (LFS)

The LFS is a household panel survey, continuous since 1992, with results produced each quarter. It has a sample of approximately 60,000 households. The LFS is the government's largest continuous household survey and participation in the survey is voluntary. LFS data is weighted to enable the population estimates to be produced. The weighting also attempts to compensate for differential non-response among different subgroups in the population. LFS is designed to provide information on the UK labour market that can be used to develop, manage and evaluate labour market policies.

Annual Business Inquiry (ABI)

This is the main government survey of companies in the UK. It is conducted in two parts: one dealing with employment, the other with financial information.